



Purchasing Local Food Guide

Guidelines for Montana School Food Service Programs
Montana Team Nutrition Program

Updated: February 2016

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Over the past decade, the farm to school movement has exploded across the United States, reaching millions of students in all 50 states and Washington, D.C. According to [Economic Research Service](#), farm to school programming has increased 430% nationwide from 2006 to 2014! Farm to school is an important tool in the fight against childhood obesity and food insecurity. In addition to improving child health, when schools buy local, they create new markets for local and regional food producers and businesses, contributing to vibrant communities--a win-win-win scenario! This guide will be helpful in setting up a system of local food procurement that works for you and your school.

The Montana Team Nutrition Program and the Montana Office of Public Instruction School Nutrition Programs are dedicated to providing guidance to school food service programs as they establish school or district protocols for enhancing their ability to procure healthy, local food products. If you have any questions or need additional guidance, please contact:

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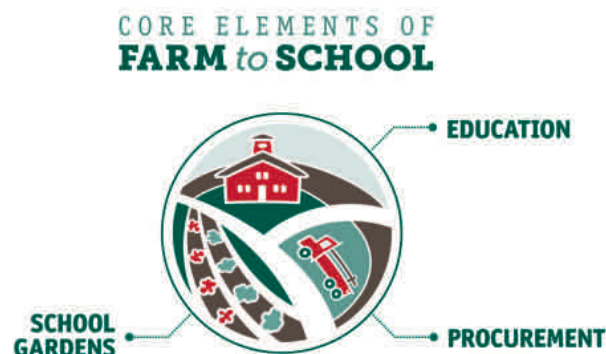
Farm to School Basics

Farm to school practices enrich the connection communities have with fresh, healthy food and local food producers by changing food purchasing and education practices at schools and preschools. Students gain access to healthy, local foods as well as education opportunities such as school gardens, cooking lessons and farm field trips. Farm to school empowers children and their families to make informed food choices while strengthening the local economy and contributing to vibrant communities. Farm to school implementation differs by location but always includes one or more of the following core elements:

- **Procurement:** Local foods are purchased, promoted and served in the cafeteria or as a snack or taste-test.
- **Education:** Students participate in education activities related to agriculture, food, health and nutrition.
- **School gardens:** Students engage in hands-on learning through gardening.



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The definition of "local" is decided by the school or community and could be defined in ways such as within 200 miles, the state of Montana, or a certain region.

For more information on farm to school visit:

- Montana Farm to School
<http://www.montana.edu/mtfarmtoschool>
- National Farm to School Network
<http://www.farmtoschool.org/>

Benefits of Farm to School Programs

Benefits to Students

Research shows that students who participate in farm to school programs show an increased willingness to try new fruits and vegetables. Kids that have easy access to a variety of high quality fruits and vegetables eat more of them. By combining increased access to local and fresh fruits and vegetables with farm to school educational activities, children demonstrate healthier nutrition behaviors.

Benefits to local producers and their communities

Farm to school programs create a new market opportunity for food producers and businesses within their own communities. By establishing either "forward contract" or an informal purchasing agreement with a school district, food producers can plan their upcoming production season and volume knowing



that they have a committed buyer for their products. Farm to school programs create more security for local producers, allowing them to continue farming on their land, preserving the agricultural heritage of our communities.

Benefits to school foodservice programs

Farm to school provides an excellent marketing opportunity. These programs can enhance student and staff participation in school meal programs by offering fresh and delicious foods. Farm to school programs present a natural connection between the school foodservice program and classrooms. The cafeteria becomes part of the learning environment for the students. Farm to school programs provide a wonderful opportunity for the school foodservice staff to connect with the food producers in their community and become important stakeholders in improving their community's access to healthy, delicious food.

Source: Farm to School Benefits Fact Sheet, National Farm to School Network

<http://www.farmtoschool.org/resources-main/the-benefits-of-farm-to-school>

General Considerations

Procurement Basics

It is important to be aware of procurement regulations that are required by law. This guide provides a snapshot of the procurement considerations. For comprehensive guidance on procurement rules and procedures, strategies for buying local foods, information on how to develop a forward contract, and helpful tools, review the **USDA's Procuring Local Food Guide**:

<http://www.fns.usda.gov/farmtoschool/procuring-local-foods>

- Purchases under the **micro purchase** threshold (Federal threshold is \$3,500 as of October 1, 2015) do not require a specific process, however it is highly recommended to gather price quotes for equivalent products to determine the best price.
- For purchases under the small purchase threshold (Montana's threshold is \$80,000 as of February 2015) follow **informal procurement** process. Gather and document price quotes for equivalent products and select the best price. You may gather quotes from all local vendors for price comparison.
- For purchases greater than the small purchase threshold (\$80,000) follow the **formal procurement** process, using either a request for proposals (RFP) or invitation for bid (IFB).
- Geographic Preference may be applied in the bidding process. Please see Appendix A to learn more about how to use the Geographic Preference option.

Clarification regarding Montana rules and procedures can be found within the General Division Services Policy Manual: <http://gsd.mt.gov/ProcurementServices/montanaprocurementlaw.mcpx>

Food Safety

Large and small producers have state and federal rules regarding how to safely handle and process the products they sell. When buying from local producers it is important to verify that suppliers of all sizes are in compliance with food safety regulations. The following steps will guide you in recordkeeping to track food safety practices from these businesses to your cafeteria.

1. Consult with your local or county sanitarian, as they can provide assistance if needed to ensure food safety from the farm to the plate and compliance to state and federal food safety regulations. Find your county's sanitarian at:

<http://dphhs.mt.gov/publichealth/FCSS/countytribalhealthdepts>

Your county Extension Agent should also be able to provide guidance for food safety. Locate your Extension Agent:

<http://www.msuextension.org/localoffices.cfm>

2. Utilize the information and resources in this guide to help you procure local foods from appropriate sources.
3. While it is not required, it is strongly recommended to request the farmer's on-farm food safety plan, Good Agricultural Practices (GAPs) Audit results, and/or other document demonstrating food-handling procedures. Either in lieu or in addition to these documents, you can use the sample **Local Produce Procurement Checklist**, provided below for whole fruits and vegetables.

Make sure you keep records from all vendors on the products you purchase so you can identify the source of the product (often called traceability) in the event of a quality issue or foodborne illness. Use the vendor's invoice or receipt similar to the one included in the *Local Produce Procurement Checklist* below on pages 8-9. The provided form is not required, but is a good guide for you to use to ensure you are following best practices. Vendors should also keep records to be able to ensure traceability of their sales.

Local Produce Procurement Checklist

The following is a list of questions for you to ask of your farmer/vendor when purchasing farm fresh produce. Keep these forms in your files as part of your record keeping.

Name of Producer/Farm:

Address:

City:

Zip:

Telephone:

E-mail:

Products to be purchased:

Production and Handling Practices	Yes	No	N/A
What is irrigation source? <input type="checkbox"/> Well <input type="checkbox"/> Stream <input type="checkbox"/> District canal <input type="checkbox"/> Pond <input type="checkbox"/> Municipal <input type="checkbox"/> Other			
If well water is used, is well protected from contamination?			
Is manure applied at least 120 days prior to harvest? If compost produced according to USDA standards is used, is it applied at least 90 days prior to harvest? <i>These are the USDA National Organic Program rules, which have been recently adopted in the new GAP standards. Compost that wasn't made according to these standards is considered "manure."</i>			
Is land use history available to determine risk of product contamination?			
Is the field protected from potential run-off from animal confinement or grazing areas?			
If portable toilets are used for workers, are they situated in a way that prevents field contamination from waste-water?			
Is dirt, mud, or other debris removed from the product before packing?			
Is rinse (potable) water source tested at least once a year and results kept on file?			
Are food product contact surfaces washed, rinsed and sanitized before using?			
Are harvesting baskets, totes, or other containers kept covered and cleaned (with potable water) and sanitized before using?			
Is storage facility well maintained and clean, with designated areas for food products and non-food items?			
Is transport vehicle well maintained and clean, with designated areas for food products and non-food items?			
Are products kept cool during storage and transport? If ice is used is it from a potable water source?			
Are workers trained in safe food handling practices?			

(Continued on next page)

Are workers instructed not to work if they exhibit signs of infection (e.g., fever, diarrhea, etc.)?			
Ordering Procedures			
How far in advance will producer inform you of product availability?			
How should orders be placed? (phone, fax, or e-mail)			
What are procedures if producer cannot fulfill requested order – (due to lack of volume or quality of product)?			
Has the price and unit of costing been negotiated?			
Delivery Procedures			
Timing of delivery			
Frequency of delivery Volume of delivery			
Product Specifications			
Desired quality or size?			
Other desired specifications?			
What substitutes are acceptable?			
What is inappropriate in terms of packaging and/or product condition?			
Payment Procedures			
Amount of lead time required by accounting office in order to add vendor?			
What is the timing for payment of invoices?			
Insurance			
Is insurance required? Does the vendor have liability insurance? If so, how much is the coverage?			

Sample Receipt From Grower:

Date: _____
 Received by: _____
 Donated: _____ Purchased: _____ Purchase price: _____
 Description and amount of product purchased: _____

 Date harvested: _____
 Harvest location: _____ Lot # if available _____
 Name of grower: _____
 Address: _____
 Phone: _____ E-mail: _____

Reference: Iowa State University Extension, **Checklist for Retail Purchasing of Local Produce**
<http://www.extension.iastate.edu/Publications/PM2046A.pdf>

Finding Local Food

Connecting with local farmers, ranchers, and food businesses may seem like a challenging endeavor, but there are several strategies to get you started.

1. Go to your local **Farmers Market** and start talking with area farmers and food business staff. Find out who is interested in working with your school/district to provide food. For a directory of Montana Farmers Markets', go to:

<http://farmersmarket.mt.gov>

2. Check out **local food and product directories**:

Made in Montana Directory

<http://www.madeinmontanausa.com/>

Farm to Cafeteria Producer Database

<http://farmtocafeteria.ncat.org/producer/>

Western Sustainability Exchange Certified Producers

<http://www.westernsustainabilityexchange.org/member-producers/>

Abundant Montana Sustainable Foods Directory

<http://www.aeromt.org/abundant/>

3. Looking for a **local meat processor**?

State-Inspected Facilities Directory

<http://liv.mt.gov/MI/state-inspected-plants.mcp>

Federally-Inspected Facilities Directory

<http://www.fsis.usda.gov/wps/portal/fsis/topics/inspection/mpi-directory>

4. Ask other **food service managers** where they source their local foods. Pose a question to other Montana food service managers on the **Montana Lunchline listserv**. For more information or to be added to this list, contact Clay Hickman, chickman@mt.gov or (406) 444-2501.

Use the Farm to Cafeteria Network's Institution Database to find other farm to school programs.

<http://farmtocafeteria.ncat.org/institution/>

5. Check with your distributor (such as SYSCO or FSA) for a list of Montana products that they stock on a regular basis. Look for local distributors, grower cooperatives, and food hubs for more information about food producers in your area.

Communicate with Producers

Keep in mind local producers will not know exactly what your food service program needs from them unless you tell them. You should take some time to think about and develop specifications for what you need, considering the categories listed here:

- **Product Pricing and Quantity**

It is very important to communicate this information early in your conversations with local food producers so that appropriate expectations are set and budgets can be established.

- **Condition of Delivered Product**

You may end up with carrots that have the greens still attached to them if you don't indicate that you would like the greens removed. Do you require specific packaging for your product (cardboard boxes or sanitized re-useable totes)? Be specific.

- **Product Delivery Schedule**

The last thing a food service manager needs is for a delivery truck to show up in the middle of the school lunch period. Be specific about what days/times work for you in terms of delivery.

- **Payment Schedule**

Do you need school board or central office approval in order to make payment for goods received? If so, plan for this process and timeline and communicate this to your vendors.

- **Regular Communication on Available Products**

Ask your local farmers, food businesses, co-ops, distributors, and other vendors to send you regular communication on what they have available for sale, including:

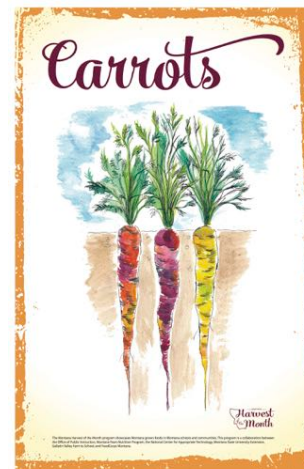
- Products
- Size of items
- Quality
- Quantity
- Prices

A Note on the Price of Local Foods: Many food service managers have seen less waste in the kitchen and on the trays due to the quality and flavor of local, farm-fresh food. A higher price may not correspond to a higher overall cost. In some schools food costs have actually gone down. A truly higher cost item can also be served less frequently or in smaller portions. For example, some schools have successfully reduced waste both during cooking and plate waste by using high quality Montana beef. Since they waste less, they are able to justify or offset the potentially higher cost. Learn

Marketing

Purchasing local products takes extra effort, so don't let that effort go unrecognized. There are many ways to feature the farm to school aspects of your foodservice program as a means of marketing your overall program. Consider the following:

- **Mark your menu.** Choose a consistent and visible method for identifying local items on your monthly menu. Consider adding information about the food producer(s) on your menu or fun facts about the foods featured on your menu.
- **Point of service** (on the lunch line) menu item labeling. Parents, staff, and community members may value your efforts to buy locally so be sure to utilize it as a marketing tool.
- Identify local items on the weekly menu that goes in the **school newsletter**, on the **school web site**, or in the **local newspaper**.
- Create a **farm to school bulletin board** in your cafeteria. Each month feature a different local farmer who is providing food to your program.
- Conduct **taste test events** with new local products or recipes.
- Work in collaboration with teachers and school administrators to set up **field trips to farms** that are providing products to your program. Call on those teachers and individuals who are already engaged in these activities such as the school's agriculture teacher or the Future Farmers of America club advisor and student members.
- Consider starting a **Harvest of the Month program** at your school by featuring a different local food each month with announcements, posters, labeling, classroom activities, etc. As of the publication of this resource the Montana Harvest of the Month program is being developed. For more information or to sign up go to opi.mt.gov/Farm2School.
- Join in the celebration! Use these events to help grow your farm to school program or showcase your on-going efforts and get more of your school and community involved.
 - October is **National Farm to School Month!** More information at opi.mt.gov/Farm2School and www.farmtoschoolmonth.org.
 - **Montana Crunch Time** is held on a designated day and time every October. Montanans across the state whether at school, work, or while having fun are encouraged to crunch into a locally or regionally grown apple. Visit opi.mt.gov/Farm2School to find out this year's date and to get the Crunch Time guide and resources.



Reference: Information in this section has been adapted from "Local Food Connections: Foodservice Considerations", Iowa State University Extension. May 2008.

Regulations



First engage in conversation with your local (county) health inspector/sanitarian. They are at the county, tribal or health district Environmental

Health office. Find your local office at: dphhs.mt.gov/publichealth/FCSS/countytribalhealthdepts.aspx.

They can help you understand the regulatory requirements for purchasing locally grown and produced food and can help create a system of documentation and traceability for all products purchased from local producers. The basic guidelines for purchasing specific products are detailed below.

Produce (Fruit and Vegetables)

Raw, unprocessed produce

Generally, no licenses, formal inspections or regulatory oversight are required of any food in its raw, unaltered state, including fruits, vegetables, raw honey, and grains for very small producers. Raw and unprocessed fruits and vegetables cannot be:

- a. Cooked
- b. Canned
- c. Preserved, except for drying
- d. Combined with other food products
- e. Peeled, diced, cut, or blanched

A **Produce Dealer License** is required for any person who wholesales produce in the state, transports produce from out of state into this state for retail sales, or retails produce grown by the produce dealer in this state when gross annual retail sales exceed \$25,000. For more information visit: agr.mt.gov/agr/Programs/Produce/

The **Local Produce Procurement Checklist** on pages 8-9 serves to guide your procurement conversations with local farmers and food producers and provides a formal mechanism for tracking local produce purchases. It is recommended, but not required, that you complete this checklist for each farmer from whom you purchase produce and keep a copy of this checklist within your records as part of your food safety plan documentation.

Some farmers may be GAP Certified. GAP stands for Good Agricultural Practices and is a certification program that many farms that sell to larger food distributors participate in. GAP is not required by law for farms to sell their products to schools. However, if a farm you are purchasing product from is GAP Certified, you probably do not need to fill out your own food safety checklist. Many small farmers may not be GAP Certified—audits are expensive and there is no federal or state GAP mandate for small farmers—but they may have an on-farm food safety plan. Ask your farmer vendors if they have implemented a GAP or on-farm food safety plan, and if so for a copy. If they don't have a written plan, you may request they develop one, but give them several weeks to complete it. More information on GAPs is available at www.gaps.cornell.edu. Montana Food and Agriculture Development centers provide training on food safety and GAPs: foodandag.mt.gov.

Processed produce and other food items

Processed items (including minimally processed such as sliced, chopped or peeled) must follow food safety and licensure requirements established by the Montana Department of Public Health and Human Services and the local Board of Health. Sanitarians do not establish requirements, they only enforce them. The basic question to ask if you are purchasing any processed products is, "Are you a licensed food manufacturer through Montana Department of Public Health and Human Services?"

Grains and Pulse Crops

Grains and pulse crops (legumes that include chick peas, lentils, dry beans, and dry peas) that have not been processed are raw agricultural commodities and do not require licensing or inspections. Processed products containing grains and pulse crops are considered a processed food. See above "Processed produce and other food items" for requirements. An agricultural commodity cannot be:

- a. Cooked
- b. Canned
- c. Preserved, except for drying
- d. Combined with other food products
- e. Peeled, diced, cut, or blanched

A **Commodity Dealers License** is required if a person engages in a business involving or, as part of the business, participates in buying, exchanging, negotiating, or soliciting the sale, resale, exchange, bailment, or transfer of any agricultural commodity in the state of Montana valuing \$30,000 annually. For more information, visit: <http://agr.mt.gov/agr/Programs/Commodities/DealersWarehouses/>.

Meat

Livestock raised in Montana and offered for sale within Montana must be slaughtered and processed in either an official Montana Department of Livestock-inspected (state-inspected) or a USDA-inspected (federally-inspected) facility. If that meat is bought or sold across state lines, it must be processed in a federal USDA-inspected facility.

Animals slaughtered and processed in a "custom exempt" plant may not be sold; that meat is for consumption by the owner(s) of the animal, which cannot include schools. However, retail meat establishments can further process state- or federally-inspected product for sale to schools. Less than 25% of their sales can be to hotels, restaurants, and institutions limited to \$76,500 of their total sales. Further, custom exempt facilities have additional regulations limiting ingredients in processed products (e.g., they cannot add fillers like soy to hamburger patties).

Labeling of meat and poultry products

All products offered for sale that are processed by an official state or federally inspected meat or poultry facility, including mobile units, or by a state-licensed poultry-exempt grower must bear an approved label. This label must have:

- True name of the product
- Product ingredients, if applicable
- Name and address of the processor or distributor
- Net weight of the product
- The inspection legend (except exempt poultry products)
- Allergen declaration
- One of the following statements or a similar perishable warning statement: "Keep Refrigerated," "Perishable," "Keep Under Refrigeration," or "Keep Frozen" if the product is perishable
- Safe Handling Labels for raw meat and poultry products

For more information about regulations regarding meat and poultry regulations contact Gary Hamel at ghamel@mt.gov or (406) 444-5293.

Poultry

Poultry raised in Montana and offered for sale within the state must be slaughtered and processed in a state Department of Livestock-inspected plant, a USDA-inspected plant, or by a grower licensed by the state under USDA's federal 1,000 bird, 20,000 bird, or small enterprise poultry grower exemptions. Poultry processed in a state-inspected plant or under the federal poultry exemption may be sold into any in-state market, including schools, but as with red meat, only meat that is processed in a USDA-inspected plant may be sold or bought across state lines. Exempt poultry operations can only sell up to 25% of total sales to hotels, restaurants, and institutions (limited to \$58,200 of their total sales).

Exempt categories are only exempt from *animal by animal inspection*. Sanitation standards apply consistently across all categories ensuring a safe and wholesome product.

Dairy

Dairy products used in school food service programs must be pasteurized in a licensed plant.

Eggs

Grade B or better eggs are required to be used in food service establishments, including school food service programs. Fresh shell eggs (Grade B or better) may be purchased from local farmers if the farmer holds an Egg Grader License from the Montana Department of Livestock.

Sources:

Montana Food Code: <http://www.mtrules.org/gateway/Subchapterhome.asp?scn=37%2E110.2>

Montana Livestock Rules: <http://www.mtrules.org/gateway/Department.asp?DeptNo=32>

Montana Code – Livestock: http://leg.mt.gov/bills/mca_toc/81.htm



Additional Farm to School Resources

General Resources

Montana Farm to School
opi.mt.gov/Farm2School/

National Farm to School Network
www.farmtoschool.org

USDA Farm to School
<http://www.fns.usda.gov/cnd/f2s/Default.htm>

Montana FoodCorps
<http://www.montanafoodcorps.org>

Farm to School Toolkit – University of Minnesota Extension
<http://www.extension.umn.edu/farm-to-school/toolkit/>

Montana Beef to Schools – Montana Department of Agriculture
<http://tinyurl.com/mtbeef-mtschools>

Montana Food and Agriculture Development Centers
foodandag.mt.gov

Farm to Cafeteria Network (Montana specific)
<http://farmtocafeteria.ncat.org/>

Events & Outreach

National Farm to School Month—Celebrate every October!
www.farmtoschoolmonth.org

Montana Crunch Time – October 26, 2015 at 2:00pm
opi.mt.gov/Farm2School/

National Food Day—October 24
<http://foodday.org/>

Farm to School Posters
www.lakecountycdc.org/Farm_to_School_Posters

Montana Harvest of the Month
opi.mt.gov/Farm2School

Recipes

Montana Recipe Roundup
http://opi.mt.gov/PDF/SchoolFood/HealthyMT/13April_HealthyMT_RecipeRoundup.pdf

New School Cuisine
<http://www.vtfeed.org/materials/new-school-cuisine-cookbook>

Massachusetts Farm to School Cookbook
http://www.massfarmtoschool.org/wp-content/uploads/2012/05/farm_to_school_cookbook.pdf

Wisconsin Home Grown Menus
http://dpi.wi.gov/sites/default/files/imce/school-nutrition/pdf/homegrown_intro.pdf



Montana Seasonal Food Chart

The Montana Seasonal Food Chart shows many of the food items grown or raised in this state that are available throughout the four seasons. For produce, the chart indicates when fresh items may be available and doesn't take into account fruits or vegetables that are available after the harvest season due to canning, freezing or dehydrating. This is not a complete list of all products grown and raised in the state. This chart is adapted from Missoula CFAC <http://www.missoulacfac.org/images/toolsandresources/seasonalchart.pdf>

Winter

Dec - April

Barley
Beef
Beets
Bison
Carrots
Cheese
Chicken
Eggs
Garbanzo Beans
Garlic
Kamut
Lentils
Milk
Mushrooms
Oats
Onions
Parsnips
Pinto Beans
Pork
Potatoes
Shallots
Sprouts
Sunflower
Seed
Turkey
Wheat
Winter Squash
Yogurt

Spring

May - June

Barley
Beef
Bison
Broccoli
Cabbage
Cauliflower
Chard
Cheese
Chicken
Collards
Eggs
Garbanzo Beans
Greens
Herbs
Kale
Kamut
Lentils
Lettuce
Milk
Mushrooms
Oats
Onions
Parsnips
Peas
Pinto Beans
Pork
Spinach
Sprouts
Sunflower
Seeds
Turkey
Wheat

Summer

July - Aug

Apricots
Barley
Basil
Beans
Beef
Beets
Bison
Broccoli
Carrots
Cabbage
Cantaloupe
Cauliflower
Chard
Cheese
Cherries
Chicken
Collards
Corn
Cucumbers
Eggs
Garbanzo
Beans
Garlic
Herbs
Kale
Kamut
Lentils
Lettuce
Milk
Mushrooms

Oats
Onions
Peas
Peppers
Pinto Beans
Pork
Raspberries
Scallions
Shallots
Spinach
Sprouts
Strawberries
Summer
Squash
Sunflower
Seeds
Tomatillos
Tomatoes
Turkey
Wheat
Yogurt

Fall

Sept - Nov

Apples
Barley
Basil
Beans
Beef
Beets
Bison
Broccoli
Carrots
Cabbage
Cantaloupe
Cauliflower
Chard
Cheese
Cherries
Chicken
Collards
Corn
Eggs
Garbanzo
Beans
Garlic
Kamut
Herbs
Kale
Leeks
Lentils
Lettuce
Milk
Mushrooms
Mustard
Greens

Oats
Onions
Peas
Pears
Peppers
Pinto Beans
Pork
Potatoes
Pumpkins
Raspberries
Scallions
Shallots
Spinach
Sprouts
Strawberries
Summer
Squash
Sunflower
Seeds
Tomatillos
Tomatoes
Turkey
Wheat
Winter Squash
Yogurt



Appendices

Appendix A: Montana's Geographic Preference



Montana law allows public institutions the option to prioritize "local" over "lowest bid" by taking advantage of an optional exemption from the Montana Procurement Act in the purchasing of Montana-produced food. This optional exemption, enacted in 2007, gives public institutions more flexibility to buy Montana-produced food, unless the purchases are made using federal dollars. The law requires that food purchasers stay within their current budgets. This means an institution may pay more for Montana-produced food items as long as the extra cost can be made up on other less expensive items or substitutions. "Montana-produced" is defined broadly in the law to mean products that were "planted, cultivated, grown, harvested, raised, collected, or manufactured" in Montana.

Appendix B: Applying Geographic Preference in Procurements

The USDA published the following fact sheet describing the Geographic Preference law and how to use it as a tool to give local vendors preference in your procurements. This fact sheet can be downloaded at: <http://www.fns.usda.gov/farmtoschool/fact-sheets>.



GEOGRAPHIC PREFERENCE

What It Is and How to Use It

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THE 2008 FARM BILL directed the Secretary of Agriculture to encourage schools to purchase locally grown and locally raised products “to the maximum extent practicable and appropriate.” The Secretary was also instructed to allow schools to use a “geographic preference” when procuring locally grown and locally raised unprocessed agricultural products.

There are many ways for schools to buy local products for use in federal child nutrition programs (see USDA’s 10 Facts About Local Food in School Cafeterias). While using geographic preference is not the only option for buying local foods, it is a powerful tool and particularly useful in formal solicitations where respondents are ranked and scored.

Types of Products

The ability to apply a preference for local products applies only to unprocessed or minimally processed items. The geographic preference rule does not apply to any products that have been cooked, heated, canned or that have any additives or fillers. It can be applied to a wide array of products that meet the definition of unprocessed or minimally processed such as various forms of fruits, vegetables, meats, fish, poultry, dairy, eggs, and grains.

Defining Local

Definitions for local vary widely depending on the unique geography and climate where a school is located and on the abundance of local food producers and manufacturers. Many schools define local as within a certain number of miles from the school, within the county, or within the state. Alternatively, definitions might include more than one state (i.e., Georgia, Alabama, and Florida) or discrete parts of several states (i.e., specific counties in southwest Washington, northeast Oregon, and Idaho). In addition, many schools use different definitions of local depending on the product or season. Also, please note that when applying geographic preference, origin is tied to the agricultural product, not the location of the respondent.

Who Defines Local?

Schools define what they mean by local. While many state and/or local governments have adopted definitions of local such as “within the state” or “within the county,” schools using a geographic preference when sourcing food for the federal child nutrition programs are under no obligation to adopt any definition for local that might be in existence in local areas.

Three Examples for Using Geographic Preference

Federal regulations do not prescribe the precise way that geographic preference should be applied, or how much preference can be given to local products. Thus, there are a variety of ways to apply geographic preference and one way is not considered better or more effective than another. The key is to be sure that use of geographic preference does not restrict full and open competition. Further, regardless of which method is used, the selection criteria must be clearly described in all solicitation materials.

EXAMPLE ONE

A school district issues an invitation for bid (IFB) for apples and states a preference for apples grown within 100 miles of the school. IFBs are generally used when a firm fixed-price contract will be awarded to the lowest responsive and responsible bidder. The solicitation makes it clear that any respondent able to provide local apples will be awarded 10 points in the selection process. In this example, the 10 preference points are equivalent to a 10 cent reduction in price for the purposes of evaluating the lowest bidder.

	OWEN'S ORCHARD	APPLE LANE FARMS	ZOE'S BEST
Price	\$1.97	\$2.05	\$2.03
Apples within 100 miles of school	No	Yes (10 Points)	No
Price with preference points applied, for evaluation purposes only	\$1.97	\$1.95	\$2.03

Apple Lane Farms meets the stated preference for local products and is awarded 10 additional points, which translates into deducting 10 cents from Apple Lane Farm's price. This makes Apple Lane Farms the "lowest bidder." The school still pays Apple Lane Farms \$2.05 for its product; deducting 10 cents from the price of responsive bidders that meet the geographic preference only applies to determining the winning respondent and would not affect the actual price paid to the respondent.

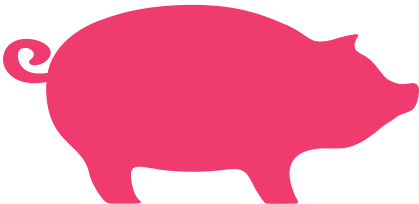
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EXAMPLE TWO

A school district issues a request for proposals (RFP) for its produce contract and indicates a preference for fresh fruits and vegetables produced within the state. For the purposes of evaluating bids, respondents who can supply at least 60% of the requested items from within the state will receive a 10% price reduction.

	PRODUCE EXPRESS	RAY'S PRODUCE	F&V DISTRIBUTION
Contract Price	\$31,000	\$35,000	\$34,000
% F&V from within the state	20	80	50
Geographic preference points to respondent able to meet > 60% local items	No	Yes (10% pref.)	No
Price with preference points applied, for evaluation purposes only	\$31,000	\$31,500	\$34,000

Ray's Produce is the only firm that is able to supply greater than 60% of the requested items from the state, thus, Ray's Produce receives a 10% reduction in price for the purposes of evaluating bids. Even with the reduction, Ray's Produce is not the lowest bidder. If price alone were the determining factor for this school district, Produce Express would be awarded the contract.



EXAMPLE THREE

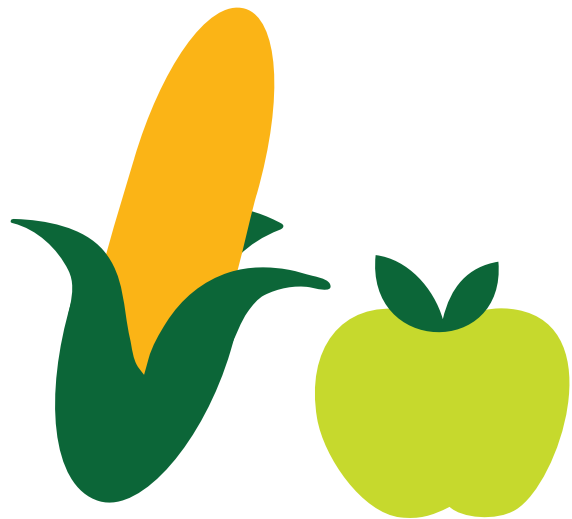
A preference for local products doesn't necessarily have to be calculated with absolute values; sliding scales may be appropriate. Further, solicitations may include evaluation criteria that allow for consideration of factors other than price alone.

Some of the factors in addition to price that might be considered include technical expertise, past experience, years in business, marketing, etc. School districts may also include elements such as ability to host farm visits, showing the state or farm of origin on the invoice, or providing farm information for education in the lunchroom as part of their selection criteria.

A school district issues a request for proposals for beans and grains and makes it clear that bids will be evaluated using a 100 point system. Ten preference points will be awarded to vendors able to provide over 70% of the requested items from within the state, 7 points for 50-69% and 5 points for 25-49%. Points for local sourcing will be included along with other evaluation factors.

	LAURIE'S LEGUMES	PAULA'S PULSES	GARY'S GRAINS
Price = 40	30	35	40
Contractor ability to perform all specifications			
Product quality = 15	25	30	30
Delivery = 10			
Packaging and labeling = 5			
Three references, past history = 10	10	10	10
Able to provide farm/ facility tour or classroom visits = 5	0	5	5
Able to provide state of origin on all products = 5	0	5	5
Ability to provide products sourced within the state = 10	0	10	7
100 possible points	65	95	97

In the example above, Paula's Pulses is able to source 75% of their products from within the state, earning them 10 points in the scoring process in the local products category. Gary's Grains can source 55%, earning them 7 points, and Laurie's Legumes is unable to guarantee any products from within the state so they receive 0 points in the local preference category. Gary's Grains wins the contract.





Additional Resources

- * **Procuring Local Foods for Child Nutrition Programs Guide**, from USDA's Food and Nutrition Service (FNS) – This comprehensive guide showcases the many ways schools can purchase locally, and correctly. The document also provides information on procurement basics, what local means and where to find local foods.
<http://go.usa.gov/KAFH>
- * **Finding, Buying, and Serving Local Foods Webinar Series**, from FNS - This series starts with an introduction to basic procurement principles, and then walks through strategies and tactics for buying local foods.
www.fns.usda.gov/farmtoschool/procuring-local-foods
- * **Program-specific procurement regulations**, from FNS – Links to regulations governing each major Child Nutrition Program from Title 7 of the Code of Federal Regulations.
www.fns.usda.gov/cnd/f2s/USDA_procurement_reg.htm
- * **Final Rule: Geographic Preference Option**, from FNS – The final rule, published in the Federal Register, includes a summary, background, and final regulatory language, by program, for the geographic preference option.
<http://www.fns.usda.gov/sites/default/files/2011-04-22.pdf>
- * **Procurement Geographic Preference Q&As Part I**, from FNS – A memo published in February 2011 addressing questions regarding application of the geographic preference option.
http://www.fns.usda.gov/sites/default/files/SP18-2011_os.pdf
- * **Procurement Geographic Preference Q&As Part II**, from FNS – A memo published in October 2012 addressing additional questions regarding application of the geographic preference option and other mechanisms for local procurement.
www.fns.usda.gov/sites/default/files/SP03-2013os.pdf
- * **State Agency Guidance on Procurement**, from FNS in partnership with the National Food Service Management Institute – An online procurement training geared towards state agencies that focuses on federal procurement requirements.
<http://www.nfsmi.org/Templates/TemplateDefault.aspx?qs=cEIEPTEzNQ>
- * **A School's Guide to Purchasing Washington-Grown Food**, from the Washington State Department of Agriculture – This guide provides information on using the geographic preference option to source local foods in Washington; however, much of the content is broadly applicable.
www.wafarmtoschool.org/Page/74/procurement-guide
- * **Geographic Preference: A primer on purchasing fresh local food for schools**, from School Food FOCUS and the Harrison Institute for Public Law at Georgetown Law – This guide provides an overview of procurement regulations and several examples for how a school might apply a geographic preference.
www.schoolfoodfocus.org/wp-content/uploads/2013/07/FOCUS_GP_Primer_July-2013.pdf

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For more information, and to sign up to receive USDA's bi-weekly Farm to School E-letter, please visit www.fns.usda.gov/farmtoschool. Questions? Email us at farmtoschool@fns.usda.gov.

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Thank
You



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